

**2009 SCOTTISH VISITOR ATTRACTION BAROMETER  
May 2009 REPORT**

Commissioned by VisitScotland

 Conducted by the Moffat Centre for Travel and Tourism  
 Business Development, Caledonian Business School,  
 Glasgow Caledonian University

**1.0 INTRODUCTION**

The Visitor Attraction Barometer is a monthly review of attractions' performance data. Attraction visitation is considered by geographic location, sector and other key variables, providing a regular monitor of performance. If you have any comments or suggestions, please contact Marina Martinolli (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: [mma4@qcal.ac.uk](mailto:mma4@qcal.ac.uk)).

This Barometer compares the period of May 2009 with May 2008. Some 548 attraction operators provided figures for the months of May 2009 with 523 attractions providing comparable visits figures.

**2.0 May 2009/2008**
**Summary**

The total number of visits for the responding 523 barometer attractions in Scotland for the period May 2009 was 3,324,217. When compared to data from the previous year of 3,343,736 visits, this shows a visits decrease of -0.6%. The total number of visits for responding attractions for January-May 2009 was 12,116,761, when compared to data from the previous year of 12,053,446 this shows a visits increase of 0.5%.

The following table shows total visits recorded for May 2009/2008 and January-May 2009/2008 as well as the % change calculation.

Attractions	May-09	May-08	%Change	Jan-May-09	Jan-May-08	%Change
523	3,324,217	3,343,736	-0.6	12,116,761	12,053,446	0.5

A further breakdown is shown below, where the visits during the individual months of January-May 2009 can be compared with January-May 2008 with their % change calculations.

Attractions	Months		Months		%Change
	Months	Visits	Months	Visits	
523	Jan-09	1,495,613	Jan-08	1,522,922	-1.8
	Feb-09	1,776,484	Feb-08	1,857,693	-4.4
	Mar-09	2,196,798	Mar-08	2,430,190	-9.6
	Apr-09	3,323,649	Apr-08	2,898,905	14.7
	May-09	3,324,217	May-08	3,343,736	-0.6

The greatest percentage increase in visits recorded by former VisitScotland Area for May 2009 was experienced by Scottish Borders (12.8%) and Outer Hebrides (10.3%). Angus & City of Dundee experienced the greatest decline in visits over the same period with decreases of -6.5%. Perthshire and Greater Glasgow experienced decreases in visits figures of -5.9% and -5.3% respectively.

During this period the greatest percentage increase in visits was recorded by the Historic House/ Palace category (25.4%) followed by Garden sites (8.5%) and Distillery sites (7.5%). The greatest decreases in visits were experienced by attractions in the Wildlife/ Zoo/ Farm/ Nature Reserve category at -14.4%, followed by Country Park/ Forest Park sites (-6.6%).

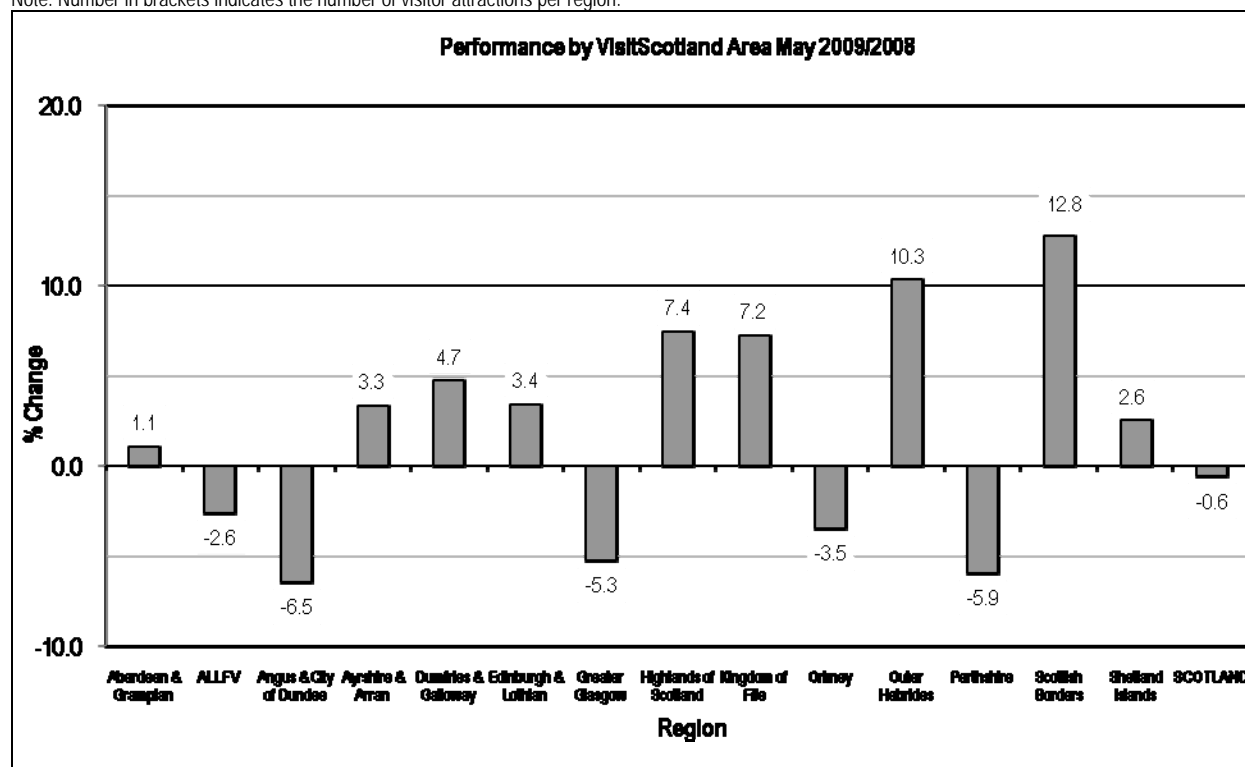
Attractions in Seaside and Urban locations experienced increases in visits of 8.0% and 0.1% respectively; whilst visits to attractions in Rural locations experienced decreases of -2.6%. Attractions welcoming between 20,000 and 49,999 visits experienced the greatest increase in visits of 8.8%, followed by those welcoming between 1 and 19,999 experiencing increases of 5.9%. Those attractions welcoming more than 50,000 visits experienced decreases of -2.2% when comparing May 2009 with May 2008.

Paid admission attractions experienced increases of 2.2%, whilst Free admission attractions experienced decreases of -2.6%. The greatest increases in visits by former LEC area were experienced by attractions in Borders (12.8%), Inverness & East Highland (10.5%) and Western Isles (10.3%). Dunbartonshire experienced the greatest decrease of -14.5% followed by Forth Valley (-13.4%) when comparing May 2009 with May 2008.

**3.0 PERFORMANCE BY FORMER VISITSCOTLAND AREA**  
 Performance by Former VisitScotland Area – May 2009/2008 and January-May 2009/2008

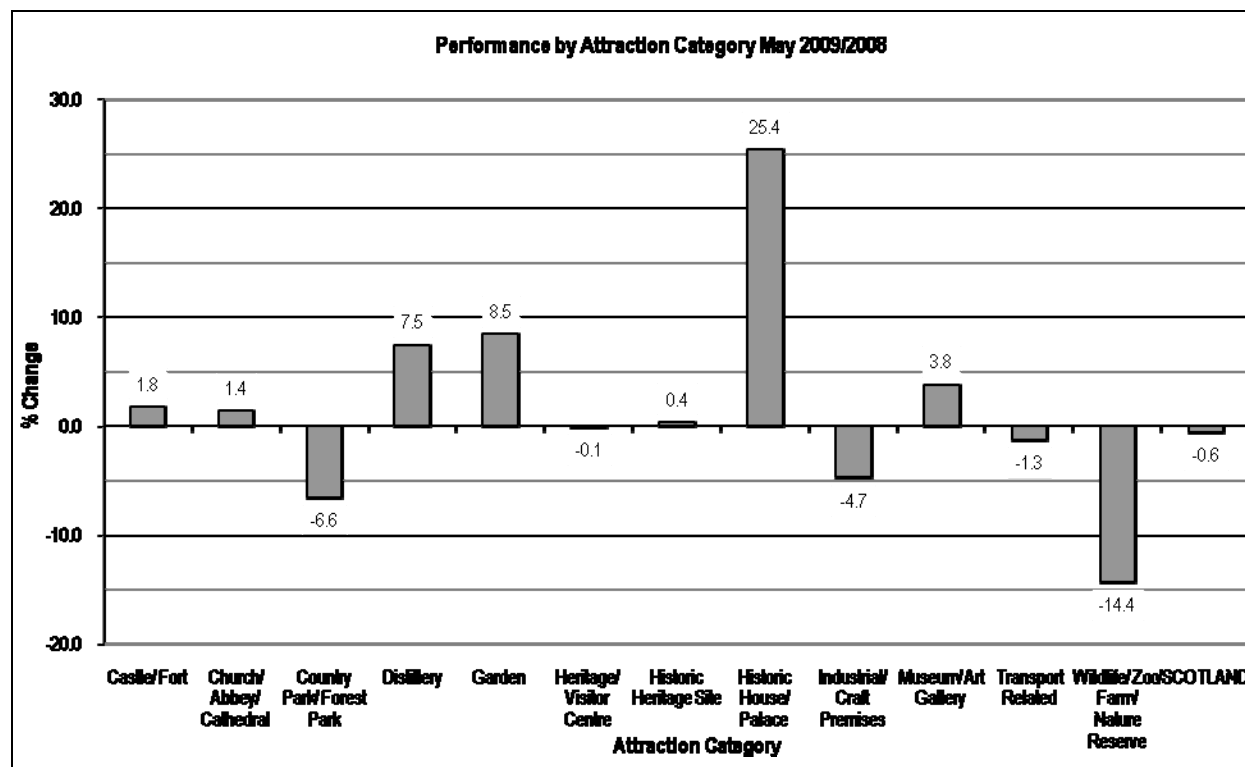
Area	May-09	May-08	%Change	Jan-May-09	Jan-May-08	%Change
Aberdeen & Grampian (62)	163,848	162,075	1.1	523,232	514,540	1.7
ALLFV (62)	265,582	272,710	-2.6	729,375	781,279	-6.6
Angus & City of Dundee (25)	76,178	81,453	-6.5	251,502	256,858	-2.1
Ayrshire & Arran (20)	145,648	140,934	3.3	470,752	452,940	3.9
Dumfries & Galloway (34)	65,312	62,362	4.7	175,005	171,315	2.2
Edinburgh & Lothian (67)	753,983	728,971	3.4	2,914,735	2,926,172	-0.4
Greater Glasgow (63)	1,262,835	1,333,076	-5.3	5,514,957	5,428,841	1.6
Highlands of Scotland (64)	309,927	288,487	7.4	795,464	757,604	5.0
Kingdom of Fife (27)	61,729	57,567	7.2	200,679	205,550	-2.4
Orkney (20)	52,669	54,576	-3.5	89,852	95,709	-6.1
Outer Hebrides (9)	28,309	25,658	10.3	93,287	90,624	2.9
Perthshire (20)	67,862	72,144	-5.9	167,701	197,379	-15.0
Scottish Borders (31)	54,996	48,771	12.8	151,072	134,103	12.7
Shetland Islands (19)	15,339	14,952	2.6	39,148	40,532	-3.4
<b>SCOTLAND (523)</b>	<b>3,324,217</b>	<b>3,343,736</b>	<b>-0.6</b>	<b>12,116,761</b>	<b>12,053,446</b>	<b>0.5</b>

Note: Number in brackets indicates the number of visitor attractions per region.



**4.0 PERFORMANCE BY ATTRACTION CATEGORY**  
 Performance by Attraction Category – May 2009/2008 and January-May 2009/2008

Category	May-09	May-08	% Change	Jan-May-09	Jan-May-08	% Change
Castle/ Fort (60)	390,467	383,599	1.8	1,006,560	1,021,544	-1.5
Church/ Abbey/ Cathedral (17)	136,369	134,461	1.4	382,004	356,196	7.2
Country Park / Forest Park (11)	875,267	936,873	-6.6	3,791,772	3,753,436	1.0
Distillery (24)	75,314	70,089	7.5	169,289	169,639	-0.2
Garden (22)	100,048	92,234	8.5	303,879	289,664	4.9
Heritage/ Visitor Centre (86)	497,882	498,213	-0.1	1,580,771	1,605,572	-1.5
Historic Heritage Site (37)	73,896	73,614	0.4	162,491	165,547	-1.8
Historic House/ Palace (41)	79,769	63,635	25.4	174,587	166,583	4.8
Industrial/ Craft Premises (13)	12,800	13,438	-4.7	37,307	43,055	-13.4
Museum/ Art Gallery (175)	842,318	811,492	3.8	3,660,412	3,670,916	-0.3
Transport Related (12)	92,311	93,530	-1.3	350,151	336,993	3.9
Wildlife/ Zoo/ Farm/ Nature Reserve (25)	147,776	172,558	-14.4	497,538	474,301	4.9
<b>SCOTLAND (523)</b>	<b>3,324,217</b>	<b>3,343,736</b>	<b>-0.6</b>	<b>12,116,761</b>	<b>12,053,446</b>	<b>0.5</b>



## 5.0 PERFORMANCE BY LOCATION

### Performance by Location – May 2009/2008 and January-May 2009/2008

Location	May-09	May-08	% Change	Jan-May-09	Jan-May-08	%Change
Rural (237)	1,357,615	1,393,558	-2.6	4,677,487	4,686,754	-0.2
Seaside (68)	207,539	192,175	8.0	568,210	554,030	2.6
Urban (218)	1,759,063	1,758,003	0.1	6,871,064	6,812,662	0.9
<b>SCOTLAND (523)</b>	<b>3,324,217</b>	<b>3,343,736</b>	<b>-0.6</b>	<b>12,116,761</b>	<b>12,053,446</b>	<b>0.5</b>

Note: Number in brackets indicates the number of visitor attractions per location.

## 6.0 PERFORMANCE BY VOLUME OF VISITS

### Performance by Volume of Visits – May 2009/2008 and January-May 2009/2008

Volume of Visits	May-09	May-08	% Change	Jan-May-09	Jan-May-08	%Change
1 - 19,999 (321)	290,146	274,072	5.9	647,540	626,155	3.4
20,000 - 49,999 (86)	318,105	292,309	8.8	892,160	871,875	2.3
50,000 + (116)	2,715,966	2,777,355	-2.2	10,577,061	10,555,416	0.2
<b>SCOTLAND (523)</b>	<b>3,324,217</b>	<b>3,343,736</b>	<b>-0.6</b>	<b>12,116,761</b>	<b>12,053,446</b>	<b>0.5</b>

Note: Number in brackets indicates the number of attractions per range of volume of visits.

## 7.0 PERFORMANCE BY ADMISSION TYPE

### Performance by Admission Type – May 2009/2008 and January-May 2009/2008

Admission Type	May-09	May-08	% Change	Jan-May-09	Jan-May-08	%Change
Free (218)	2,105,797	2,161,602	-2.6	8,593,875	8,559,006	0.4
Paid (305)	1,218,420	1,182,134	3.1	3,522,886	3,494,440	0.8
<b>SCOTLAND (523)</b>	<b>3,324,217</b>	<b>3,343,736</b>	<b>-0.6</b>	<b>12,116,761</b>	<b>12,053,446</b>	<b>0.5</b>

Note: Number in brackets indicates the number of visitor attractions per admission type.

8.0 **PERFORMANCE BY FORMER LOCAL ENTERPRISE COMPANY (LEC) AREA**

Performance by Former LEC Area – May 2009/2008 and January-May 2009/2008

LEC	May-09	May-08	%Change	Jan-May-09	Jan-May-08	%Change
Argyll & The Islands (31)	89,137	82,062	8.6	191,894	183,908	4.3
Ayrshire (19)	141,907	137,741	3.0	464,314	446,204	4.1
Borders (31)	54,996	48,771	12.8	151,072	134,103	12.7
Caithness & Sutherland (14)	30,570	28,890	5.8	75,452	77,224	-2.3
Dumfries & Galloway (33)	64,939	61,977	4.8	174,212	170,703	2.1
Dunbartonshire (9)	98,050	114,740	-14.5	382,648	419,415	-8.8
Edinburgh & Lothians (67)	753,983	728,971	3.4	2,914,735	2,926,172	-0.4
Fife (27)	61,729	57,567	7.2	200,679	205,550	-2.4
Forth Valley (28)	189,742	219,203	-13.4	564,669	617,760	-8.6
Glasgow (31)	368,227	375,532	-1.9	1,677,158	1,661,819	0.9
Grampian (49)	136,646	137,202	-0.4	460,531	455,710	1.1
Inverness & East Highland (27)	148,353	134,288	10.5	416,257	390,017	6.7
Lanarkshire (18)	734,087	763,064	-3.8	3,215,096	3,119,101	3.1
Lochaber (7)	31,066	32,012	-3.0	91,100	79,211	15.0
Moray (15)	30,308	28,530	6.2	66,093	63,566	4.0
Orkney (20)	52,669	54,576	-3.5	89,852	95,709	-6.1
Renfrewshire (10)	56,209	55,637	1.0	221,378	214,496	3.2
Shetland (19)	15,339	14,952	2.6	39,148	40,532	-3.4
Skye & Wester Ross (13)	90,202	83,657	7.8	198,365	194,358	2.1
Tayside (46)	147,749	158,706	-6.9	428,821	467,264	-8.2
Western Isles (9)	28,309	25,658	10.3	93,287	90,624	2.9
<b>SCOTLAND (523)</b>	<b>3,324,217</b>	<b>3,343,736</b>	<b>-0.6</b>	<b>12,116,761</b>	<b>12,053,446</b>	<b>0.5</b>

Note: Number in brackets indicates the number of visitor attractions per former LEC Area.

9.0 **COMMENTS**

The following quotes have been drawn from comments made by operators to explain influences on visitation performance during May 2009.

Reasons for positive impacts on visitor figures:-	Reasons for negative impacts in visitor figures:-
<ul style="list-style-type: none"> <li>More European visitors</li> <li>TV coverage of attraction</li> <li>Extended opening hours</li> <li>More school visits</li> </ul>	<ul style="list-style-type: none"> <li>No coach business</li> <li>Poorer weather compared with May 2008</li> <li>Road works deterred visitors</li> <li>Fuel costs</li> </ul>